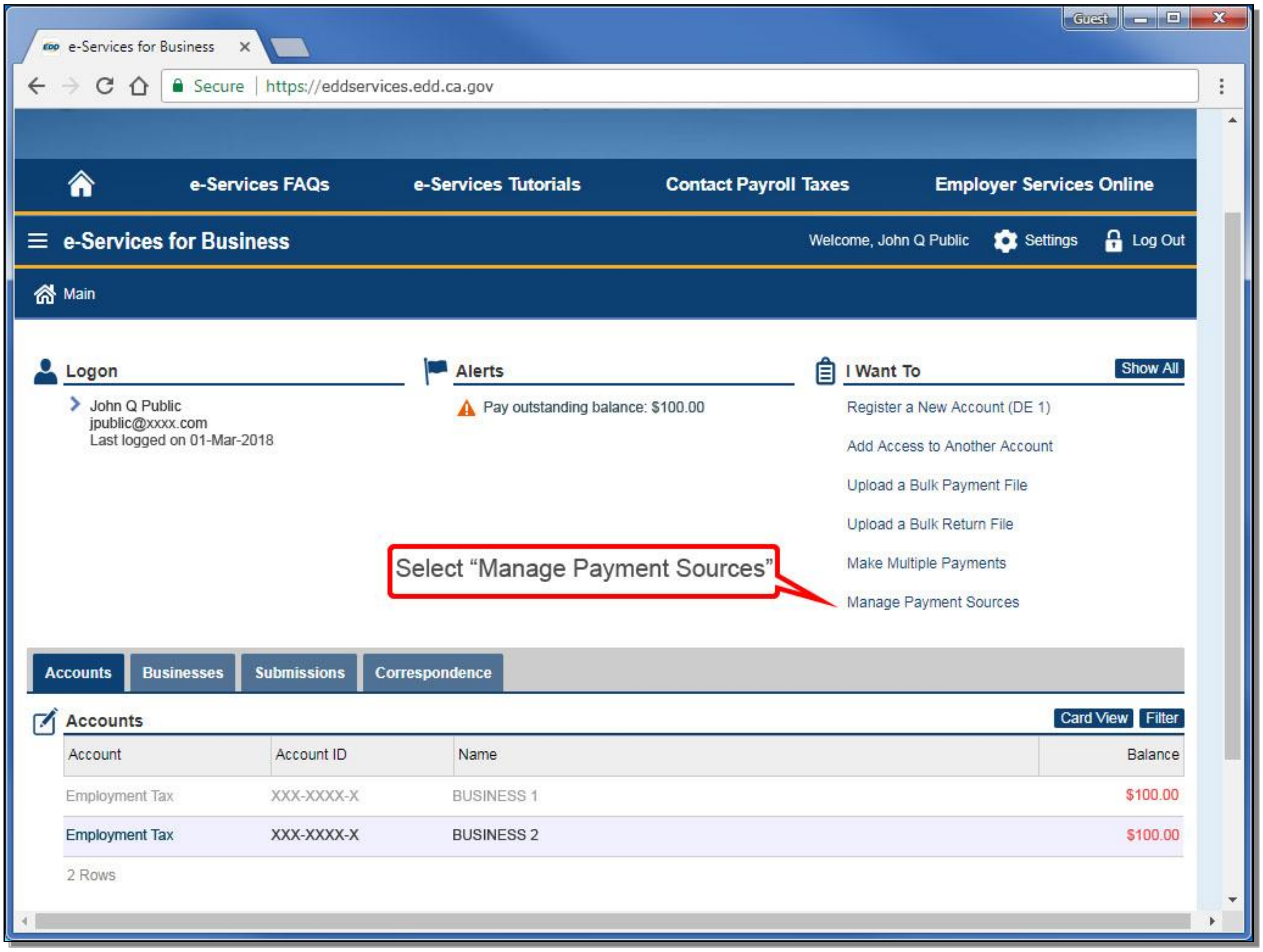
I Want to Set up Stored Bank Information or Shared Payment Source

Slide notes

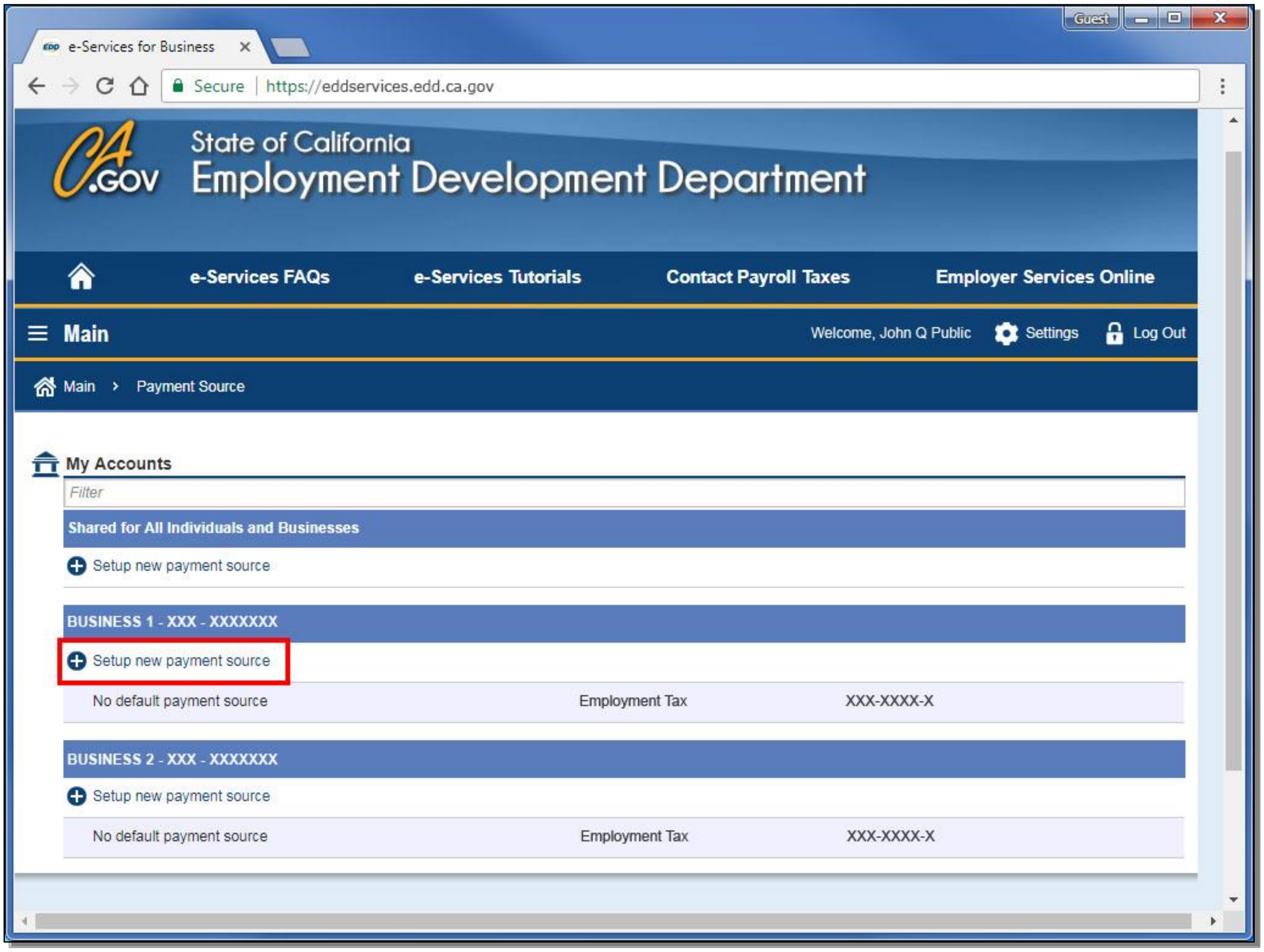
The California Employment Development Department (EDD) developed this tutorial to assist you with navigating through e-Services for Business.

This tutorial will show you how to set up stored bank account information for individual accounts and how to set up a shared payment source for all your enrolled accounts in e-Services for Business.



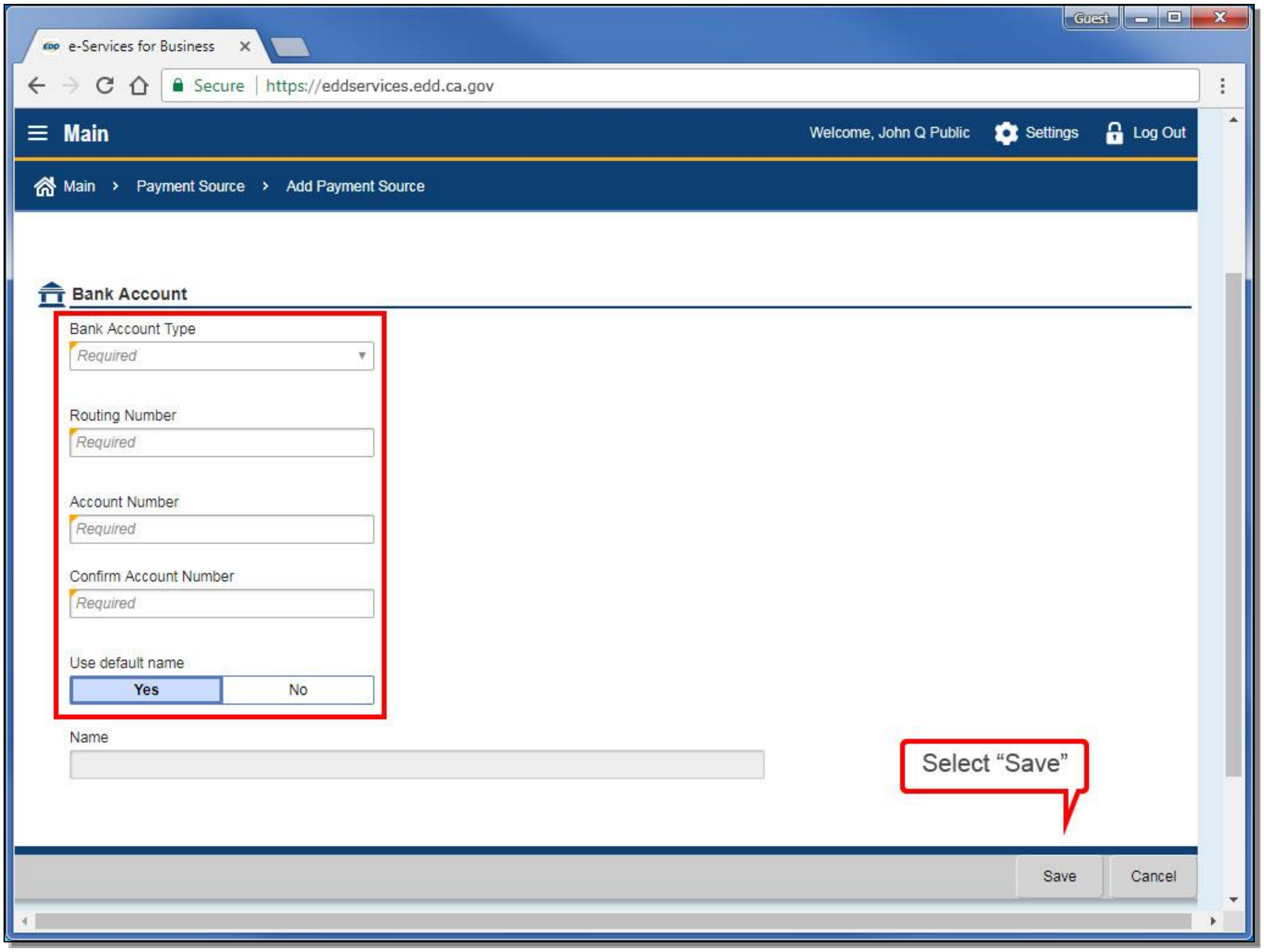
Slide notes

To set up stored bank account information for an individual account, we will begin at the e-Services for Business home page. Select the “Manage Payment Sources” link from the “I Want To” menu.



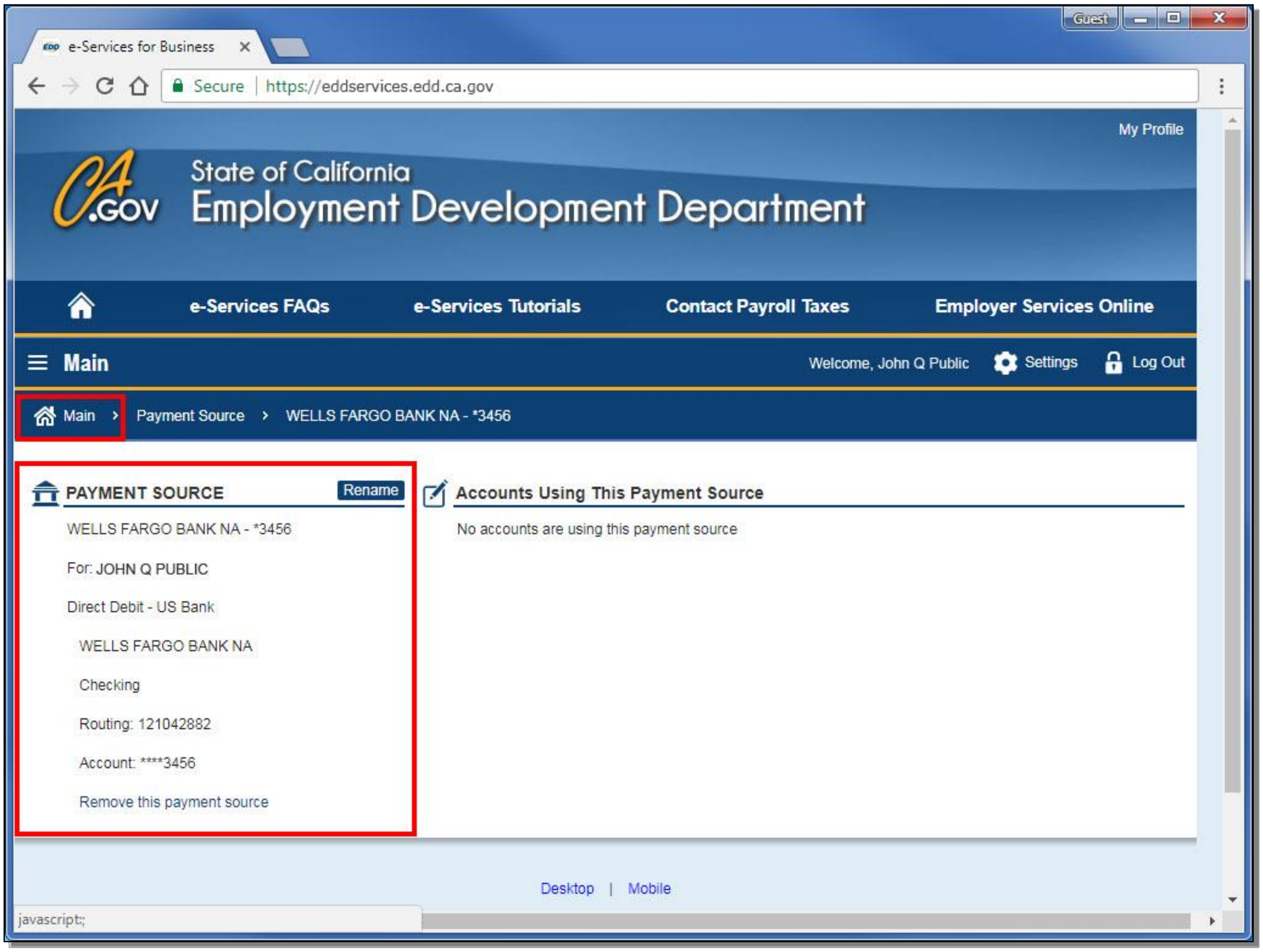
Slide notes

Select the “Setup new payment source” link under an individual business account.



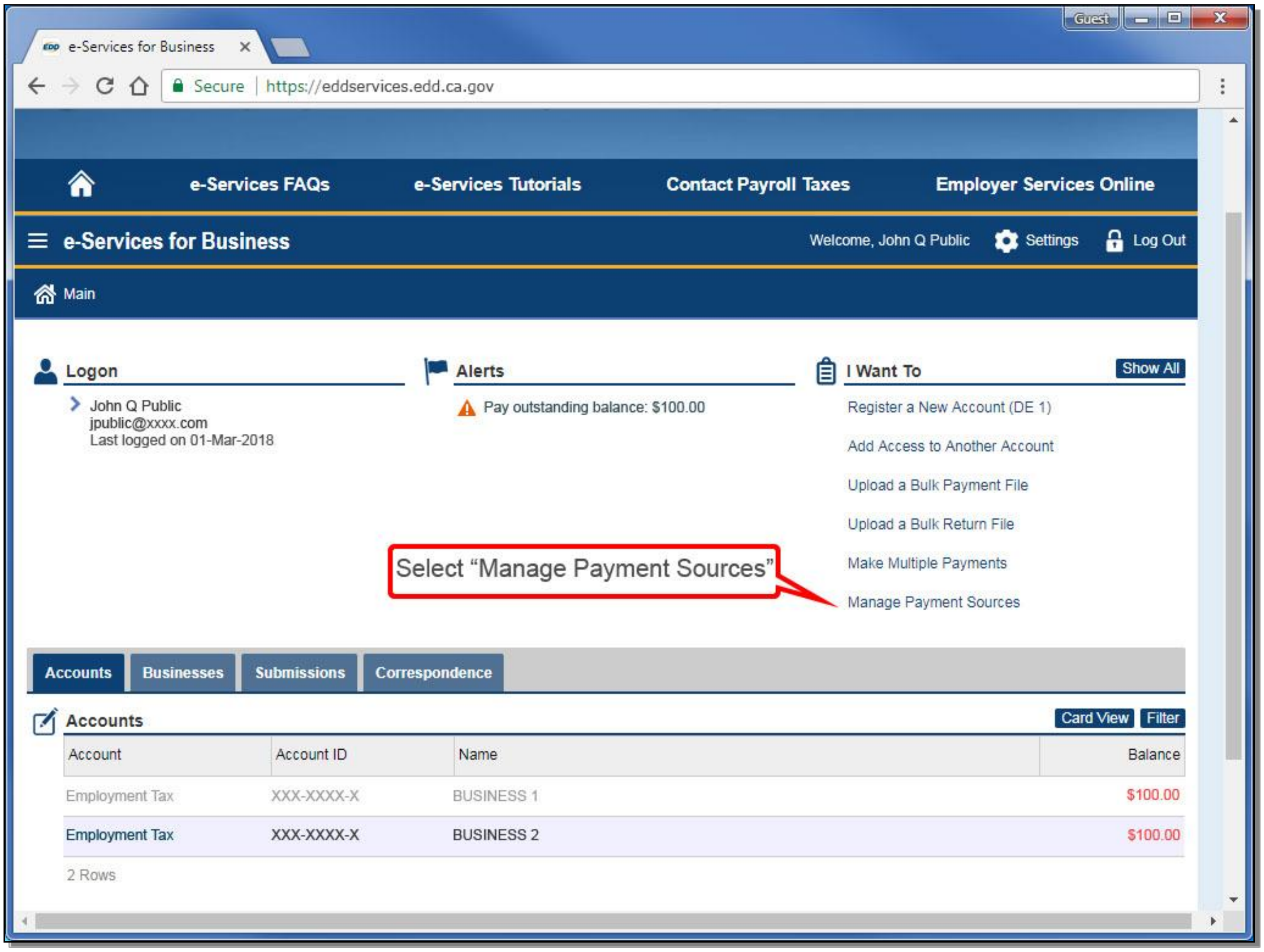
Slide notes

Select either checking or savings from the “Bank Account Type” drop down menu. Enter the correct routing number, account number, and then re-enter the account number in the “Confirm Account Number” field. If you would like to use a different name from the default name, select the “No” tab and enter a name you will remember. When completed, select "Save" to continue.



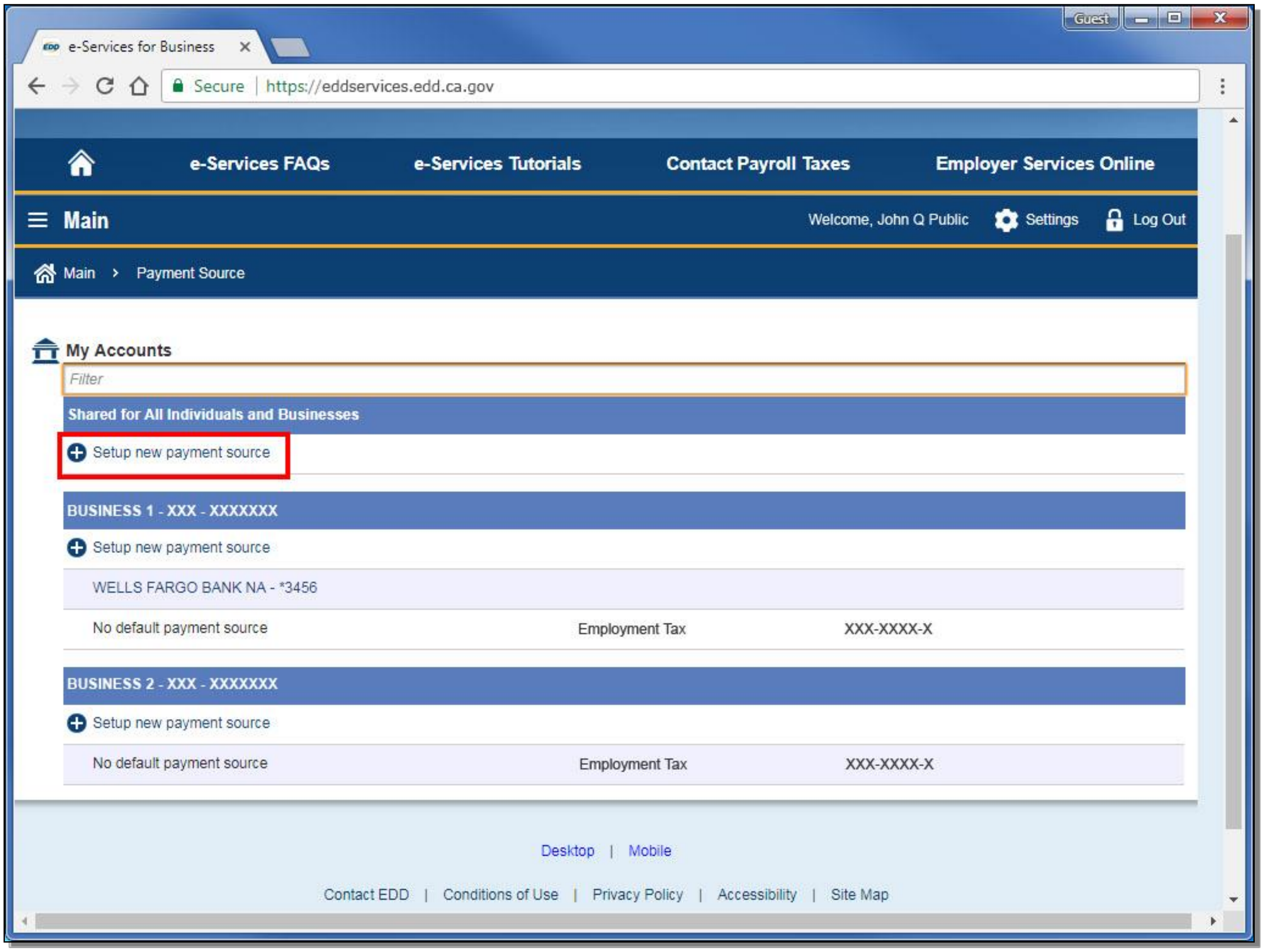
Slide notes

This stored payment information will now be the default payment source for all payments made for this account in e-Services for Business. You still have the option to manually enter payment information if you choose to use one different than the stored payment information. Select “Main” to navigate back to the e-Services for Business home page.



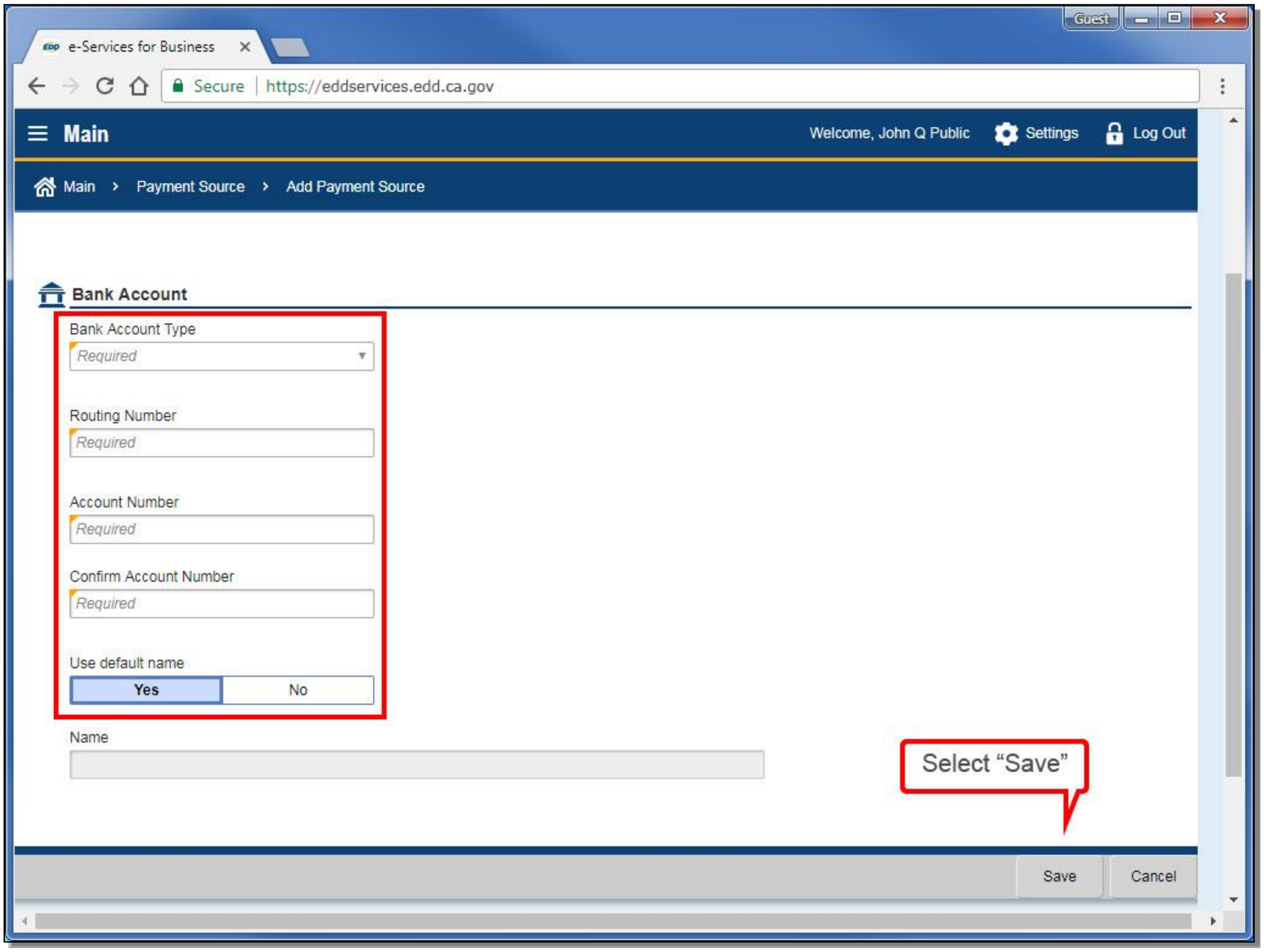
Slide notes

Now, we will set up a shared payment source for all your enrolled accounts in e-Services for Business. Select the “Manage Payment Sources” link from the “I Want To” menu.



Slide notes

Here we can see the individual payment source we just added for a single account. Select the “Setup new payment source” link in the “Shared for All Individuals and Businesses” section to add a payment source that can be used for all accounts you have access to.



Slide notes

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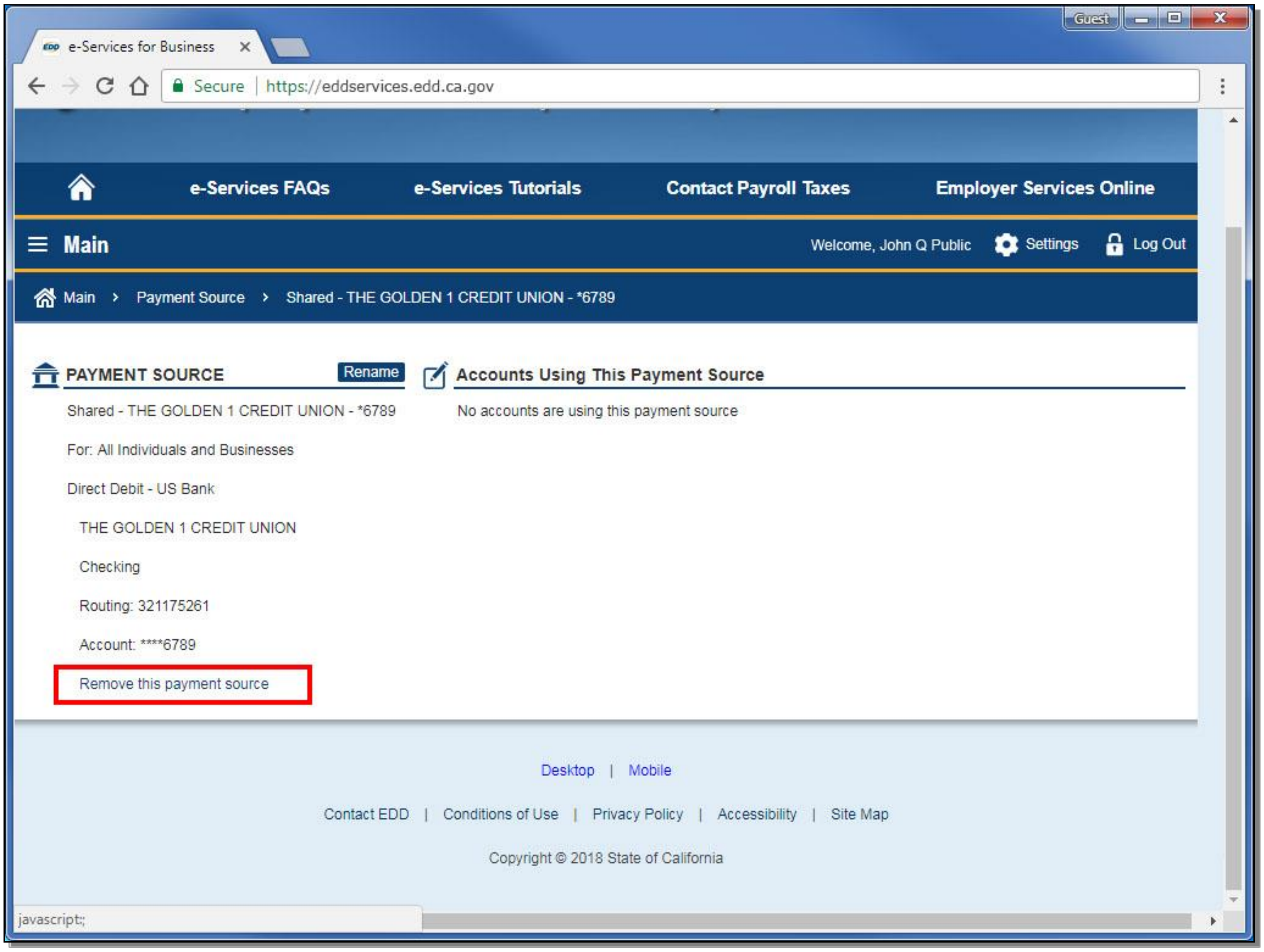

Slide notes

This payment source will now be available for use on all other accounts. If at any time you would like to stop using this shared payment source, return to this page and select the “Remove this payment source” link in the “PAYMENT SOURCE” section.

Slide notes

Thank you for taking the time to watch this tutorial on how to store individual and shared payment information.

Be sure to view our other tutorials demonstrating how to file a return, make a payment, and the many other actions available in e-Services for Business.

Other resources are available at www.edd.ca.gov or by calling the Taxpayer Assistance Center at 1-888-745-3886.